

COORDINATED FUNDING PROGRAM:
MEASURE B BIKE/PED COUNTYWIDE DISCRETIONARY FUND, TDA ARTICLE 3, AND
TFCA PROGRAM MANAGER FUNDS
FY 2005/2006

APPLICATION GUIDANCE

This document summarizes how to complete and submit an application for the new Alameda County Coordinated Funding Program. The following three funding sources are being coordinated for the first time with one call for projects and one application:

- Measure B Countywide Discretionary Funds (administered by ACTIA)
- TDA Article 3 Funds (administered by Alameda County Public Works)
- TFCA Program Manager Funds (administered by ACCMA)

HOW DO I SUBMIT AN APPLICATION?

All application materials can be downloaded from the internet at the below websites. Detailed program information for each funding source and other applicable resources are also at these websites.

www.accma.ca.gov/pages/funding.shtml
www.acta2002.com (click on "2000 Measure B")
www.acgov.org/pwa

The applications are due by Friday, January 7, 2005 at 3:00 p.m.

Submit ***four*** complete hard copies of your application AND an electronic version.

Hard copies: Each application must be loose leaf (not bound) and easily reproducible in black and white.

Electronic Version: Submit an electronic version of all MS Word and MS Excel files. Maps and .pdf files do not need to be submitted electronically. Clearly name each file.

Submit your application to:

Alameda County Congestion Management Agency
Attn: Matt Todd, Senior Transportation Engineer
1333 Broadway, Suite 220
Oakland, CA 94612

Email: mtodd@accma.ca.gov

Applications may be hand-delivered or mailed. Faxed applications and late applications will not be accepted.

HOW DO I FIND OUT MORE INFORMATION ABOUT EACH FUNDING SOURCE?

For detailed information about each funding program, including all procedures and requirements, please review the following resources, also available at the websites listed on the previous page:

- Measure B Bicycle and Pedestrian Countywide Discretionary Fund *Program Guidelines* (adopted December 2004)
- TDA – MTC Resolution 875, Revised (Attachment A: Transportation Development Act, Article 3, Pedestrian/Bicycle Projects: Procedures and Project Evaluation Criteria)
Website: http://www.mtc.ca.gov/funding/claim_forms.htm
- TFCA – Program Guidelines

WHO MAY APPLY?

Only public agencies may apply for funds. See below for fund-specific information.

Measure B: Any public agency that operates within Alameda County may apply for funding. Non-profits and private companies may join with a public agency to sponsor and implement a project, but the public agency must be the applicant and the project lead.

TDA: All cities and the County are eligible to claim funds under TDA Article 3. Joint powers agencies are also eligible.

TFCA: Funds may only be awarded to public agencies. In certain instances, a public agency may apply for TFCA funds on behalf of a non-public entity. Please contact ACCMA staff if you need additional information on applicant eligibility.

WHAT TYPES OF PROJECTS AND PROGRAMS ARE ELIGIBLE FOR FUNDING?

The following table includes some of the major eligible project/program types. For additional information, including additional eligible projects/programs, consult the funding source program guidelines or contact the appropriate staff person.

<i>Selected List of Eligible Project/Program Type:</i>	Measure B	TDA	TFCA
Bikeway construction	X	X	X
Pedestrian facilities	X	X	
Feasibility Studies/preliminary design/environmental review	X		
Engineering and Construction of Bikeway	X	X	X
Bikeway Design	X	X	
Maintenance of Class 1 bikeways	X	X	
Bike Parking & Bike Racks on Buses	X	X	X
Bike/Ped Master Plans (and Plan Updates)	X	X	
Bicycle Safety Education Programs		X	

<i>Selected List of Eligible Project/Program Type:</i>	Measure B	TDA	TFCA
Clean Fuel Vehicles			X
Smart Growth (which may include pedestrian facilities)			X
Transit Info/Shuttles			X
Rideshare Programs			X
Arterial Management Projects			X

All projects and programs should be located in Alameda County. If a project/program extends beyond the limits of Alameda County, other funds may be required to implement that portion of the project/program.

Additional Information on Measure B: Programs, such as enforcement or promotion programs, are not an eligible category of funding in this cycle for Measure B funds. Capital projects that enhance and expand bicycle and pedestrian access, convenience and safety are eligible for funding, and include all phases of a capital project.

Ineligible Projects/Programs for **all** funding sources include:

- Routine maintenance (*Exceptions: Measure B* does allow maintenance of Class I bikeways and bike-transit facilities in some cases. Please refer to *Measure B Program Guidelines* for more info. **TDA** allows maintenance of Class I bikeways which are closed to motorized traffic, and restriping Class II bike lanes.)
- On-going operations (*Exceptions: TFCA* has been used for shuttle operation projects. Please contact ACCMA staff if you need additional information on TFCA project eligibility.)

WHAT ARE THE BASIC ELIGIBILITY POLICIES?

Each funding source has its own eligibility requirements, detailed in the program guidelines. The key requirements are summarized below.

Measure B: All projects must have **countywide significance** to be eligible for funding. In general, projects must serve residents from more than one specific area or jurisdiction in Alameda County. Specifically, “countywide significance” is defined in the following ways:

For Bikeways:

- Bikeways (either new or upgraded) must be part of a recommended Cross County Corridor in the Countywide Bicycle Plan.

For Other Capital Bicycle Projects and All Pedestrian Projects:

- Projects must either serve facilities or activity centers which attract users from more than one specific area or jurisdiction (such as transit stops/stations, colleges, regional parks, etc), or
- Project must be a demonstration or pilot project that could be applicable to other agencies/jurisdictions.

Local Bicycle and/or Pedestrian Master Plans:

- All local master plans are considered to have countywide significance since they will enhance the ability of the county to identify and implement the highest priority bicycle and/or pedestrian improvements

TDA: All projects must be reviewed by a Bicycle Advisory Committee and must have environmental clearance. For additional requirements, refer to the TDA procedures:

http://www.mtc.ca.gov/funding/claim_forms.htm

TFCA: All projects must reduce motor vehicle emissions to be eligible for funding. An individual project may not exceed the \$100,000 per ton cost effectiveness ratio.

HOW MUCH MONEY IS AVAILABLE AND WHAT IS THE MAXIMUM AND MINIMUM AWARD?

Overall, about \$4.0 million in funds is available. For funding source specifics, see below and the *Fund Estimate* (available on the previously listed websites).

Measure B: \$1.0 million is available in this cycle. The minimum grant award amount is \$10,000 and the maximum grant award amount is \$500,000. Funds will be distributed equitably between bicycle and pedestrian projects.

TDA: See *Fund Estimate* for amount available.

TFCA: See *Fund Estimate* for amount available. The minimum funding request is \$50,000.

IS A LOCAL MATCH REQUIRED?

No matching funds are required (except for TDA applications for Bike Safety Education Programs which require a 50% match). However, the Measure B evaluation criteria prioritize projects with outside sources of funding.

HOW ARE FUNDS DISTRIBUTED?

Projects approved for Measure B and/or TFCA funds will require Funding Agreements. Staff from each respective agency will coordinate with the project sponsor to create and sign a Funding Agreement for each funding source. Projects approved for TDA funding will receive an Allocation Instruction Letter from MTC. All funding sources distribute funds on a reimbursement basis, after submittal of invoices. Other procedures related to fund distribution are listed below, by funding source.

Measure B:

- Project Sponsors may begin incurring project costs as of the date the ACTIA Board approves the allocation of funds. No reimbursements will be made prior to the execution of the Funding Agreement.
- Indirect Costs (i.e. overhead) will not be reimbursed.
- Failing to meet the timely use of fund requirements, meet the project schedule without compelling reason, file required reports, or comply with applicable regulations could result in loss or withholding of funding.

TDA: Project sponsors may begin incurring project costs as of July 1, 2005. MTC will issue an *Allocation Instruction Letter* for each approved project after August 2005.

TFCA: Project sponsors may begin incurring project costs as of the date of the BAAQMD approval of the project. Upon execution of a fund transfer agreement, project sponsors may request reimbursement for documented expenses on an approved project. Project sponsor must complete a "Request for Reimbursement of Funds" form (included in the fund transfer agreement) for each request. Eligible costs for the TFCA program are detailed in the TFCA Program Guidelines available on the ACCMA website.

IS A RESOLUTION REQUIRED?

A resolution does not need to be submitted with the application. If a project is selected for Measure B and/or TDA funding, an authorizing resolution will be required. The resolution(s) must be submitted **by June 1, 2005**. Additionally, once a draft list of projects is approved for TDA, sponsors of those projects will be required to complete the MTC TDA application and submit it to the County **by May 6, 2005**.

HOW MANY APPLICATIONS MAY BE SUBMITTED?

An agency may submit a maximum of three (3) applications for Measure B funds. There is no limit to the number of applications that may be submitted for TDA and TFCA funds.

HOW WILL THE APPLICATIONS BE EVALUATED?

All submitted applications will be sorted by requested funding source. An individual application may be evaluated for multiple funding sources. Staff will perform an initial review to confirm project eligibility for each funding source. Next, each agency will evaluate the applications according to the procedures for each funding source, described below. Once a draft list of projects is developed for each funding source, the entire combined draft list will be reviewed by staff from all three programming agencies. *The three programming agencies will work together to maximize funding opportunities with the limited funds available.*

Measure B: ACTIA staff and the Bicycle and Pedestrian Advisory Committee (BPAC) will evaluate and score each application. Projects will be evaluated using a variety of criteria, as outlined in the *Program Guidelines*. The scoring guidance will be used to score each application.

The most heavily-weighted evaluation criteria are those specifically called out in the *Measure B Expenditure Plan*, which include:

- Gap closure
- Access to transit (intermodal connections)
- Countywide significance
- East Bay Regional Park District project/facility (as identified in the Alameda Countywide Bicycle Plan)
- Significant leveraging of outside funding

These evaluation criteria alone do not determine which projects are funded. As outlined in the *Program Guidelines*, equity criteria will be applied to determine the final list of recommended projects. Equity criteria include:

- *Modal Equity* – Roughly equal funding for bicycle and pedestrian projects over the life of the Funding Program.
- *Geographic Equity* – Equitable distribution of funds throughout the County over the life of the Funding Program.
- *Balance of Project Types* – Funding for a variety of project types, not solely construction projects.

TDA: The County will evaluate whether or not each application meets the program criteria. The County will modify the TDA target amounts after receiving a final estimate from MTC in February 2005.

TFCA: The CMA will evaluate all applications for their ability to reduce motor vehicle emissions. The CMA will measure the effectiveness level of TFCA funded projects using the TFCA cost of the project divided by an estimate of the total tons of vehicle emissions that are reduced due to the project. The overall aggregate cost-effectiveness of the Alameda County TFCA Program Manager Funds must be \$90,000 per ton or lower (per Air District FY 04/05 program guidelines). Individual projects may exceed the \$90,000 per ton limit, but may not exceed \$100,000 per ton, as long as the overall aggregate cost effectiveness requirement is met. Priority will be given to projects that provide more emissions reductions per TFCA dollar.

WHAT IS THE SCHEDULE FOR THIS FUNDING CYCLE?

December 3, 2004	Call for Projects
December 7, 2004	Workshop for Applicants: 11:30 AM to 12:30 PM at ACTIA
January 7, 2005	<i>Application Deadline</i>
January 2005	Projects reviewed by staff
February 2005	Measure B projects evaluated by ACTIA's BPAC (Meetings scheduled for February 10 and 15)
March 2005	Draft Program Approved for TFCA and Measure B; and Final TDA fund estimate
April 2005	Final Program Approved for Measure B, TDA and TFCA
May 6, 2005	<i>TDA approved projects</i> : Deadline to submit MTC application to County
June 1, 2005	<i>TDA and Measure B approved projects</i> : Deadline to submit Resolution(s) to County and/or ACTIA
June 2005	TDA Program Approved by County Board of Supervisors and sent to MTC
July 2005	Air District approval of TFCA program; and Measure B Funding Agreements mailed to sponsors
August 2005	MTC approval of TDA program
September 2005	TFCA Funding Agreements mailed to sponsors

WHAT ARE THE DEADLINES FOR EXPENDING FUNDS?

Each funding source has its own requirements for timely use of funds. The deadline for expending all funds is summarized in the following table. Specific timely use of funds requirements are included below.

<i>Funding Source</i>	<i>Expenditure Deadline Explanation</i>	<i>Anticipated Expenditure Deadline for Application Submittal Purposes Only (**Not official deadline**)</i>
Measure B	All funds must be expended within two (2) years of ACTIA Board approval of the project list.	April 2007
TDA Article 3	All funds must be expended within three (3) fiscal years of the funding allocation.	June 2008
TFCA Program Manager	All TFCA funds must be expended within two (2) years of first transfer of funds from the Air District to the CMA.	November 2007

Measure B: All Countywide Discretionary-funded projects/programs (or project phases) must be initiated within a year of the Board approval of funding, and all Countywide Discretionary funds must be expended within two years of this date, unless a longer period is approved in advance by ACTIA. If the submitted project cannot be completed within two years, this should be stated in the application and an exception may be granted by ACTIA after considering justification from the Project Sponsor. Grant funds may be rescinded if a project is not initiated within the first year (or the pre-approved timeframe).

TDA: The funds must be expended by June 30, 2008. Project funds not drawn by September 30, 2008 will revert to the TDA fund.

TFCA: The TFCA Program Manager program is subject to the CMA's adopted timely use of funds policy, which can be found on the CMA website listed previously.

Unless an exception is requested in the application, sponsors must:

- 1) Execute the fund transfer agreement within three months of receipt from the CMA.
- 2) Begin initiation of the project/program within three months of executed funding agreement.
- 3) All TFCA funds must be expended within two years of first transfer of funds from the Air District to the CMA.
- 4) Sponsors must submit requests for reimbursement at least once per fiscal year. Requests must be submitted within six (6) months after the end of the fiscal year,

defined as the period from July 1 to June 30. All final requests for reimbursement must be submitted no later than six (6) months after the end of the fiscal year in which the project was completed.

WHAT ARE THE MONITORING REQUIREMENTS?

Both TFCA and Measure B require regular progress reports and a final report once the project is completed. Both funding sources also require pre and post-project monitoring to assess project effectiveness. For TDA-funded projects, an annual audit report must be submitted for each fiscal year in which reimbursements are requested. However, TDA does not require any progress reports. Refer to the websites listed previously for more detailed information about the monitoring requirements for each funding source.

WHERE DO THESE FUNDS COME FROM?

Measure B: Measure B, approved by Alameda County voters in 2000, is a half-cent transportation sales tax that will finance a multitude of projects and programs to improve the County's transportation system. Collections began in April 2002 and will continue through March 2022. Five percent (5%) of the net revenue collected is dedicated to bicycle and pedestrian projects. These funds are broken into two funding components:

- 75% of the funds are local "pass-through" funds which are distributed to Alameda County cities and the County based on population; and
- 25% of the funds are for countywide planning and projects, including this grant source, known as the "Measure B Bicycle and Pedestrian Countywide Discretionary Fund."

TDA: TDA funds are generated from a tax of one-quarter percent on all retail sales in each county. Funds are collected by the state and allocated by MTC.

TFCA: The TFCA program is funded by the \$4 vehicle registration fee collected by the state. The CMA is the overall program manager in Alameda County and is responsible for programming 40% of vehicle registration fees collected in Alameda County. Pursuant to the CMA's adopted Program guidelines, the funds are distributed as follows:

- Guarantee Program - 70% allocated to cities/county based on population; minimum \$10,000 per jurisdiction.
- Transit Discretionary - 30% allocated to the discretionary program for transit-related projects. This component is programmed on a two-year basis. The next 30% discretionary transit component of the program will be for the FY 2006/2007 and 2007/2008 years.

WILL FUNDING BE AVAILABLE IN THE FUTURE?

This first coordinated funding program will be evaluated and revisions to the program administration may be made. At this time, the next call for projects is anticipated to be in October 2005. This call for projects is anticipated to include the county-share of

the MTC Regional Bicycle/Pedestrian Program, in addition to Measure B, TDA and TFCA. The next TFCA call for projects will also include the 30% transit discretionary portion of the program.

QUESTIONS?

Please consult the resources available on the websites listed on page 1. If you have any further questions about the coordinated funding program or a specific funding source, please contact one of the staff listed below:

<i>Measure B:</i>	<i>TDA Article 3:</i>	<i>TFCA Program Manager:</i>
Rochelle Wheeler, Bicycle & Pedestrian Coordinator Alameda County Transportation Improvement Authority 426 17 th Street, Suite 100 Oakland, CA 94612	Ruben Izon, Transportation Engineering County of Alameda Public Works Agency 399 Elmhurst Street Hayward, CA 94544	Matt Todd, Senior Transportation Engineer Alameda County Congestion Management Agency 1333 Broadway, Suite 220 Oakland, CA 94612
(510) 267-6121	(510) 670-6470	(510) 836-2560 x15
rwheeler@acta2002.com	rubeni@acpwa.org	mtodd@accma.ca.gov